

## 03b\_Workflow of PolyU Scholars Hub – Validation & Notifications

### 1. Validation/Finalization of PolyU Scholars Hub record

Department admins are responsible for validating the record drafts submitted by researchers. Each content type has its own workflow steps:

<p style="text-align: center;"><b>Activities:</b></p> <div style="background-color: #333; color: white; padding: 5px; margin-bottom: 2px;">Entry in Progress</div> <div style="background-color: #333; color: white; padding: 5px; margin-bottom: 2px;">✓ For approval</div> <div style="background-color: #007bff; color: white; padding: 5px;">Approved</div>	<p style="text-align: center;"><b>Prizes:</b></p> <div style="background-color: #333; color: white; padding: 5px; margin-bottom: 2px;">Entry in Progress</div> <div style="background-color: #333; color: white; padding: 5px; margin-bottom: 2px;">✓ For validation</div> <div style="background-color: #007bff; color: white; padding: 5px;">Validated</div>
<p style="text-align: center;"><b>Press/Media:</b></p> <div style="background-color: #333; color: white; padding: 5px; margin-bottom: 2px;">Entry in Progress</div> <div style="background-color: #333; color: white; padding: 5px; margin-bottom: 2px;">✓ For approval</div> <div style="background-color: #007bff; color: white; padding: 5px;">Approved</div>	<p style="text-align: center;"><b>Research output:</b></p> <div style="background-color: #333; color: white; padding: 5px; margin-bottom: 2px;">Entry in progress</div> <div style="background-color: #333; color: white; padding: 5px; margin-bottom: 2px;">✓ For approval</div> <div style="background-color: #333; color: white; padding: 5px; margin-bottom: 2px;">Approved</div> <div style="background-color: #007bff; color: white; padding: 5px;">Validated</div>

When the record can be ‘published’, you may tick the last step (**approved / validated**) of the workflow. Please note that all records would not appear in PolyU Scholars Hub portal until the record is finalized. (if the visibility is supposed to be “Public – No restriction”)

## 2. Data Quality Assurance

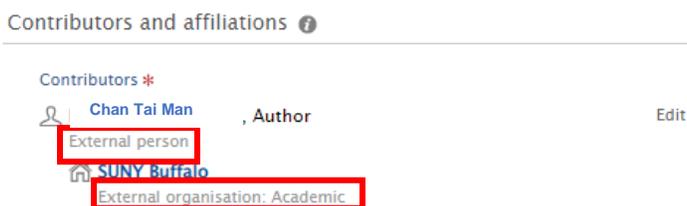
### 2.1 Authors and affiliations

Recognizing the correct contributors for publications/prizes/awards are essential in PolyU Scholars Hub, as all these records would be linked to researchers' profile. Records would be missing if mapped to a wrong contributor to the record.

Therefore, beware of the data accuracy when performing import matching.

For an author matched to **external person**:

- If all affiliations are external, no need to change anything



- If one affiliation is PolyU, it could be 1) Name mismatch, or 2) ex- or non-PolyU person, please investigate

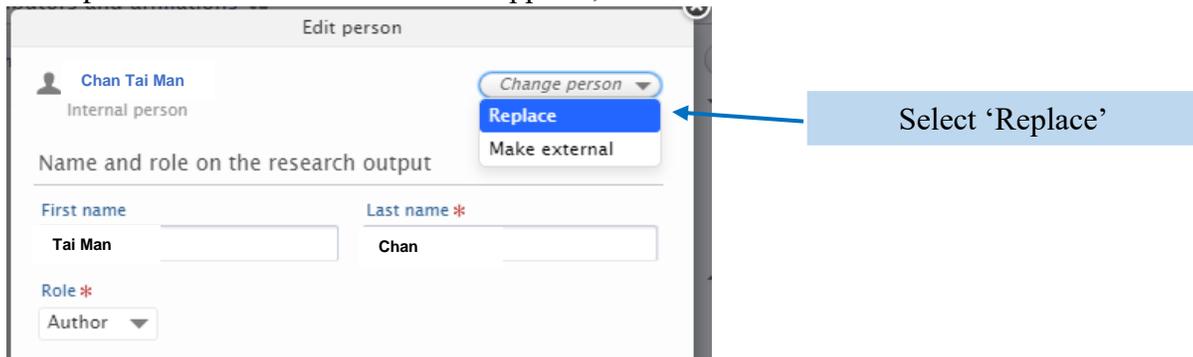


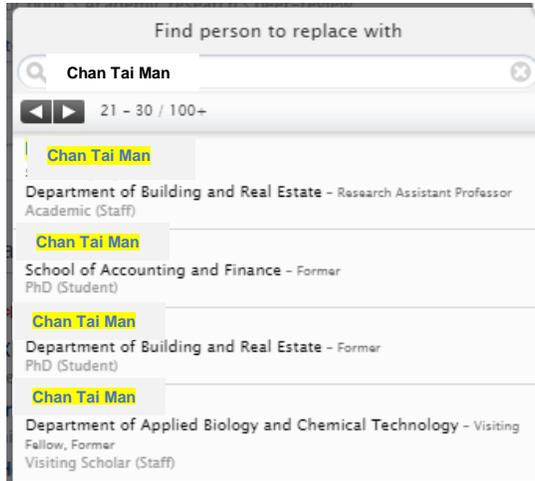
For an author matched to **internal PolyU staff**:

- **Make sure the staff is from the correct department**, as there may be PolyU researchers with identical name



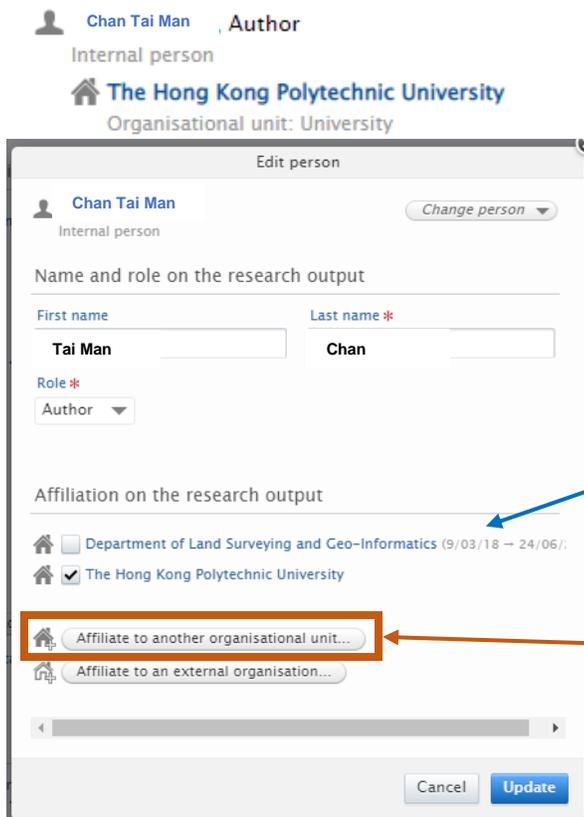
→ If person with incorrect affiliation appears, click 'edit'





Select the account with correct affiliation, then save the changes

- If affiliation does not have the department name, add it back by clicking “edit”



You could simply tick the box if the system suggested the correct department affiliation here

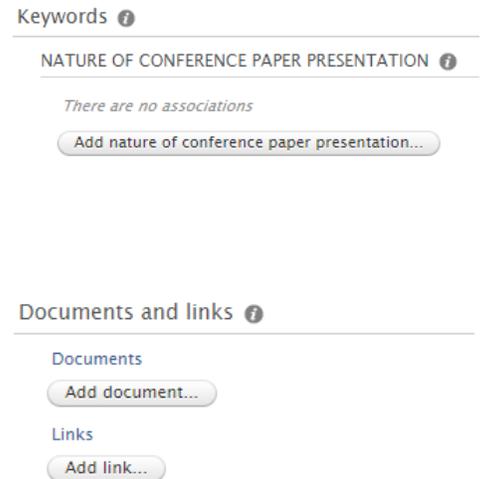
If affiliation not suggested, click here and search for the respective organizational unit

- If affiliation is external, make sure only keep parent-level info
- If no affiliation is PolyU, it is most likely published outside PolyU. Leave it as it is but only keep parent-level info

For detailed practices and instructions, you may refer to **Manual 2d - Insert Research Output**.

## 2.2 Conference presentation and optional items

- **Conference presentation:**  
UGC required that a conference presentation must specify whether it's by invitation or not.  
  
If a research output is of this type, make sure this is selected. This is an optional field as it applies to only one research output type.
- **Optional items:**  
You may want a staff to provide supporting documents as a proof of his submission, e.g. a photo of a prize he received.  
  
This can be uploaded in the “Documents and links” section. Files uploaded this way are **for backend use only**.

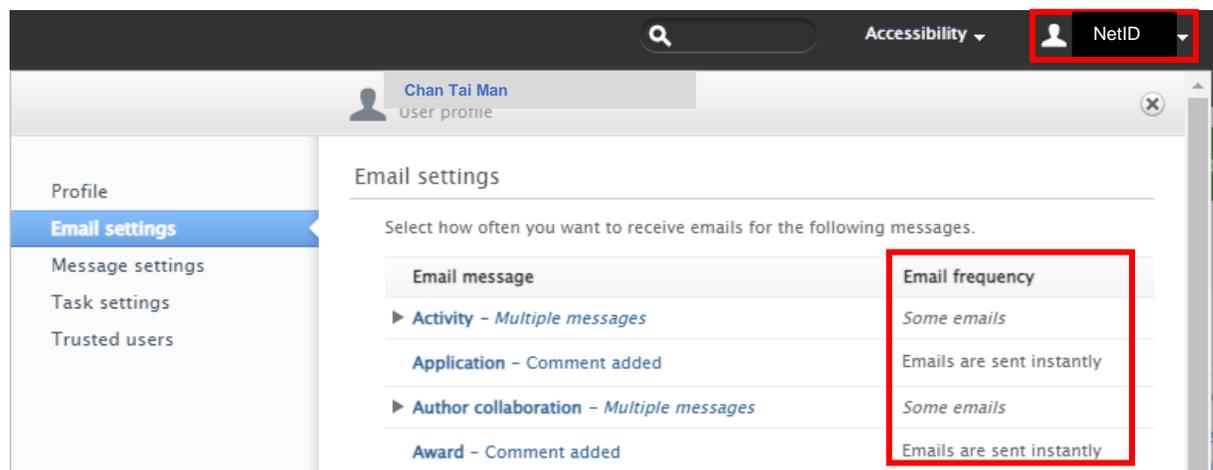


## 3. Email & System Notifications

You can configure PolyU Scholars Hub to alert you on any pending tasks.

### 3.1 Email notifications

You could change your email settings and preferences in PolyU Scholars Hub, by clicking your NetID displayed near the search bar.



You may edit the **email frequency** in the below display to decide how frequent you would want to receive email from each workflow of PolyU Scholars Hub editing activities.

▼ **Research output**

Notification

Comment added	Emails are sent instantly
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Editorial task

Claim/disclaims	Emails are never sent
Workflow: Entry in progress	Emails are never sent
Workflow: For approval - Creation/forwarding	Emails are never sent
Workflow: For approval - Returning	Emails are never sent
Workflow: For re-validation - Returning	Emails are never sent
Workflow: Approved - Forwarding	Emails are never sent
Workflow: Approved - Returning	Emails are never sent

► **Student thesis - Multiple messages**

**Here is our recommendation, however:**

- **DO NOT** get alerts on the “Entry in progress” workflow trigger unless you really want; otherwise you will get alerts in every record saved in draft mode
- If you just started using PolyU Scholars Hub, set it to at least once a week for email alerts. Then gradually relax the frequency once you are more familiar with the platform

### 3.2 System notifications

- System notifications refer to pending task displays on your PolyU Scholars Hub workspace
- In the “Task settings” part, you could also have similar configuration as the previous “Email settings” section.

Profile  
Email settings  
Message settings  
**Task settings**  
Trusted users

Task settings

Select which tasks you want to show in the right hand side of the workspace.

Task	Show
► Activity - Multiple tasks	Some tasks
► Press/Media - Multiple tasks	Some tasks
► Prize - Multiple tasks	Some tasks
▼ <b>Research output</b>	
Editorial task	
<input checked="" type="checkbox"/> Workflow: Entry in progress	
<input checked="" type="checkbox"/> Workflow: For approval - Creation/forwarding	
<input checked="" type="checkbox"/> Workflow: For approval - Returning	
<input checked="" type="checkbox"/> Workflow: For re-validation - Returning	
<input checked="" type="checkbox"/> Workflow: Approved - Forwarding	
<input checked="" type="checkbox"/> Workflow: Approved - Returning	

Similar to email notifications, you may select the tasks that you would like to receive notifications for. Task notifications would be shown on the right-hand side of your PolyU Scholars Hub workspace on the main page. (see below) **It is strongly recommended to set ‘show task’ so that available updates could be viewable on the main page.**

The screenshot displays the user profile settings for Chan Tai Man. The 'Task settings' section is active, showing a list of tasks with checkboxes to 'Show task'. Below this, the main workspace shows a list of activities and a notification panel on the right.

Task	Show
Activity – Workflow: Entry in Progress	<input checked="" type="checkbox"/> Show task
Person – Curriculum Vitae with new content	<input checked="" type="checkbox"/> Show task
Press/Media – Workflow: Entry in Progress	<input checked="" type="checkbox"/> Show task
Prize – Workflow: Entry in Progress	<input checked="" type="checkbox"/> Show task
▶ Research output – Multiple tasks	Some tasks
Student thesis – Workflow: Entry in progress	<input checked="" type="checkbox"/> Show task

Category	Count
Activities	415
Editorial work for journals	184
Invited talk	102
Organizer / committee member	48
Office holder / member of other professional body	22
Consultancy	16
Office holder / member of committee	14
Oral presentation	11
Review of books, other publications, or software	8
Examination	3
Academicians	3
More...	
Press/Media	524
Press/Media	524
Awards	0
Facilities/Equipment	0

**Tasks**

281 Research outputs are waiting to be pushed to next workflow step

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1 Prize is waiting to be pushed to next workflow step

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16 Press/Media are waiting to be pushed to next workflow step

Note: Click ► to expand the list and amend if needed

- Notification: something related to you is changed in Pure
- Personal task: you are asked to make some changes on a record related to you in Pure

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▼ Research output

Notification

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- Comment added
- Person association changes

Personal task

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- Workflow: Entry in progress